

Amendment and Response

Applicant: Glyn Phillip Morris, et al.

Serial No.: 10/776,668

Filed: February 11, 2004

Docket No.: C330.103.101

Title: TRANSACTION MANAGEMENT TOOL

IN THE CLAIMS

This Listing of Claims replaces all prior versions, and listings, of the claims:

Listing of Claims

1. (Currently Amended) A fee estimation tool for a professional services firm for estimating the a cost of a new matter, such as litigation and/or employee tribunal, the tool comprising a quoting module, a scoping module, and a management module, at least one of the modules being operable to identify details of billed amounts for like, but completed matters and determine an estimated of the cost for the new matter using the billed amounts for the like, but completed matters.
2. (Currently Amended) A fee estimation tool as claimed in claim 1, wherein at least one of the modules that is operable to extract the details of billed amounts from a database or file that includes details of billed amounts for a plurality of different matters.
3. (Currently Amended) A fee estimation tool as claimed in claim 1 wherein the details of the billed amounts include any of the a number of professional hours billed; the a grade of fee earners involved; the a time taken to complete the matter; the a time spread of the charges; re-chargeable disbursements, and costs for other services, including photocopying.

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4. (Currently Amended) A fee estimation tool as claimed in claim 1, wherein at least one of the modules that is operable to determine the estimated ~~amount-cost~~ for a new matter based on an average over a plurality of completed matters.

5. (Currently Amended) A fee estimation tool as claimed in claim 1, wherein at least one of the modules that is operable to determine the estimated ~~amount-cost~~ based on an average over a plurality of completed matters and corrected to take into account changes in hourly billing rates.

6. (Currently Amended) A fee estimation tool as claimed in claim 1, wherein at least one of the modules that is operable to use time spread information to provide an indication of what percentage of costs are incurred at what stage of a matter.

7. (Currently Amended) A fee estimation tool as claimed in claim 6, wherein at least one of the modules that is operable to present the time spread information graphically.

8. (Currently Amended) A fee estimation tool as claimed in claim 6, wherein at least one of the modules that is operable, ~~in the event that the new matter becomes live~~, to provide an indication of the time spread information of live billing data for the new matter as percentage of the estimated ~~total-cost~~ and the an estimated duration of the matter.

9. (Currently Amended) A management tool for a professional services firm, the tool comprising a quoting module, a scoping module, and a management module, at least one of the

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modules being operable to identify details of fees for professional hours billed and ~~the a~~ grade or category of fee earners involved for a plurality of like, but completed matters, and use this information to determine what percentage of ~~the a~~ total fee from the hours billed is provided by each grade or category of fee earner involved.

10. (Currently Amended) A tool as claimed in claim 9, wherein at least one of the modules is operable to receive a user input of an estimated fee and use this and the percentage ~~cost fee~~ provided by each grade of fee earner to calculate ~~the an~~ amount of ~~the an~~ estimated fee ~~that can~~ be allocated to each fee earner grade, and ~~the a~~ corresponding number of fee earner hours for each fee earner grade.

11. (Currently Amended) A tool as claimed in claim 9, wherein at least one of the modules ~~that is~~ operable to receive a user input of an estimated fee and ~~allow the a~~ variable composition of ~~the a~~ fee earner team ~~to be varied~~, and use ~~the new fee earner team data composition to~~ calculate ~~the numbers a number~~ of hours each team member would have to do to keep within the estimated fee ~~or for~~ a specified margin.

12. (Currently Amended) A management tool for a professional services firm, the tool comprising a quoting module, a scoping module, and a management module, at least one of the modules being operable to identify details of billed amounts for like, but completed matters, including an average cost and duration, and use this information to provide an indication of what costs are incurred at what stage of a matter.

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13. (Currently Amended) A tool as claimed in claim 12 wherein the average costs are expressed as a portion or percentage of the a total cost, and the average duration is divided into predetermined time slots and expressed as a a-portion/percentage of the a total average duration.

14. (Currently Amended) A tool as claimed in claim 12, wherein at least one of the modules that is operable to present the cost/time-spread data average cost and duration graphically.

15. (Currently Amended) A tool as claimed in claim 12, wherein at least one of the modules that is operable to use billing data for a live matter, together with an —estimate of the a total fee cost and an estimated date of completion for that live matter to provide an indication of the portion of the total fee-cost used to date.

16. (Currently Amended) A tool as claimed in claim 12, wherein at least one of the modules that is operable to use billing data for a live matter, together with an estimate of the a total fee cost and an estimated date of completion for that live matter to provide an indication of the portion of the total fee-cost used to date and to graphically present cost/time-spread cost and duration information for the live matter graphically.

17. (Currently Amended) A management tool for a professional services firm, the tool comprising a quoting module, a scoping module, and a management module, wherein the modules are that is operable to use historical billing information for a plurality of like, but

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completed matters to calculate ~~the a~~ number of professional hours and grade of fee earner for a new, but similar matter in order to meet an estimated fee using the historical billing information and provide an indication of the ~~east-fee~~ as a function of time for both the historical matters and the new matter.

18. (Currently Amended) A management tool for a professional services firm, the tool comprising a quoting module, a scoping module, and a management module, wherein the modules are ~~that is~~-operable to use historical billing information for a plurality of like, but completed matters to determine an estimated fee for a new matter; calculate ~~the a~~ number of professional hours and grade of fee earner for that new matter in order to meet ~~an-the~~ estimated fee using the historical billing information and provide an indication of the ~~east-fee~~ as a function of time for both the historical matters and the new matter.

19. (Currently Amended) A management tool for a professional services firm, the tool comprising a quoting module, a scoping module, and a management module, wherein the modules are ~~that is~~-operable to use historical billing information for a plurality of like, but completed matters to determine estimates for a new matter; calculate ~~the a~~ number of professional hours and grade of fee earner needed for that new matter in order to adhere to a specified profit margin and provide an indication of ~~the-cost~~ as a function of time for both the historical matters and the new matter.

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20. (Currently Amended) A method for providing management ~~information reports~~ for a professional services firm involving using historical billing information for a plurality of like, but completed matters to determine estimates for a new matter; calculating the a number of professional hours and grade of fee earner needed for that new matter in order to meet an estimated cost and providing an indication of the estimated cost as a function of time for both the historical matters and the new matter.

21. (Currently Amended) A method for providing management ~~information reports~~ for a professional services firm involving using historical billing information for a plurality of like, but completed matters to determine estimates for a new matter; calculating the a number of professional hours and grade of fee earner needed for that new matter in order to adhere to a specified profit margin and providing an indication of the cost as a function of time for both the historical matters and the new matter.